REQUEST FOR PROPOSAL

Business Development Technical Support Services
A0072 2021 BDG BPA-001

Under

ACDI/VOCA Business Development Group

Funded By
N/A
N/A

<table>
<thead>
<tr>
<th><strong>RFP Release Date:</strong></th>
<th>3/5/2021</th>
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<tbody>
<tr>
<td><strong>Performance Period:</strong></td>
<td>4/16/2021-4/15/2022</td>
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<td><strong>Option periods:</strong></td>
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<td>4/16/2022-4/15/2023</td>
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<td>4/16/2023-4/15/2024</td>
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<tr>
<td><strong>Proposal Submission Deadline:</strong></td>
<td>4/2/2021</td>
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<tr>
<td><strong>Question/ Inquiry Submission Deadline:</strong></td>
<td>3/19/2021</td>
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I. INTRODUCTION

A. COMPANY BACKGROUND

Based in Washington, D.C., ACDI/VOCA is a nonprofit international development organization that delivers technical and management assistance in agribusiness, financial services, enterprise development, community development, and food security in order to promote broad-based economic growth and a vibrant civil society. For more information, go to www.acdivoca.org.

B. PROGRAM BACKGROUND

The successful bidder will work with ACDI/VOCA’s Business Development Group, the company’s central new business unit. We are a strategic group deeply committed to excellence as we support our company’s efforts to address issues of food security, economic prosperity, and social inclusion through locally driven market solutions. In addition to other responsibilities, our division guides the management, including writing, of competitive bids. BDG also oversees the production of all proposals, which includes proposal editing, formatting, and final packaging. The successful bidder’s main point of contact will be ACDI/VOCA’s Business Intelligence Manager, Clay Rogers.

II. PURPOSE

ACDI/VOCA is looking to engage one or multiple individuals and/or firms to provide services during capture and proposal business development phases as part of a blanket purchase agreement (BPA). We are seeking seasoned proposal professionals with at least five years of experience responding to United States Government (USG), specifically the United States Agency for International Development (USAID), Requests for Applications (RFAs) and Requests for Proposals (RFPs). Services may be required on evenings and weekends, as well as during normal business hours due to the nature of proposal submissions and the urgency of deadlines.

The BPA will support new business initiatives in the capture and proposal business stages. The purpose of the BPA is to establish and agree upon all terms and conditions, including unit rates, which will be binding in the event ACDI/VOCA issues Task Orders. The intent is to streamline the ordering process and eliminate the need for repetitive negotiation and issuance of stand-alone contracts for the provision of proposal services. ACDI/VOCA anticipates awarding multiple BPA contracts, with one of those awards to go to a small business concern. The award of a BPA contract does not guarantee a minimum order. The ordering of services will only occur at the Task Order level.

A. SCOPE OF WORK

The selected firm(s) will deliver any or all of following proposal services on an as-needed basis:

- Editing Services, specifically:
  - Substantive Editing Services, includes all of the “basic editing services, below” as well as:
    - Editing to ensure proposal is clear, concise, credible, compelling, and client-focused.
    - Making sure the various components and technical sections are consistent with each other, including the various technical annexes, when required, to reflect the technical approach.
    - Cutting unnecessary text to bring proposals within page count.
    - Improving text for emphasis and readability, i.e. adding in headers when needed, bolding for emphasis, changing text to bullet points for easier reading.
  - Basic Editing Services, including:
    - a) “One voicing” proposals – e.g. using the same types of words, phrasing, tenses throughout to make it appear that it was written by a single author.
    - b) Copy editing for grammar, punctuation, etc. in accordance with the ACDI/VOCA internal style guide.
    - c) Formatting proposals in accordance with the ACDI/VOCA proposal template, if applicable or as required.
• **Proposal Production Services, including:**
  - Constructing full proposal volumes from disparate parts, working with proposal teams to ensure all required sections of proposal (according to solicitation) are complete and included.
  - Formatting proposals in accordance with solicitation requirements and ACDI/VOCA proposal template.
  - Conducting and facilitating final quality checks, synthesizing feedback from team into final, submission version of proposal.

• **Proposal and Capture Management Services, including:**
  - Ensure that capture and proposal teams’ efforts apply industry and ACDI/VOCA best practices to ensure quality, competitive, and responsive submissions. This Proposal Management role works in partnership with the Proposal Leader (PL) to customize the application of best practices to the unique needs of each bid.
  - Work with the PL and capture/proposal team to evaluate all elements of the bid, particularly including competitive landscape, teaming, staffing, and cost.
  - Work primarily with the PL to ensure tasks and activities are progressing on schedule; reach out proactively to any team member if there is a potential concern that a deadline may be missed; make recommendations to ensure timely resolution of issue.
  - Create the initial calendar and proposal outline within our standard proposal template within 48 hours of solicitation release. Review with the PL and Technical Writer to finalize the outline so that it is available for the kick-off meeting.
  - Create Technical Compliance Matrix and conduct technical compliance reviews of all evaluated sections (including annexes, if scored) in parallel with first or subsequent draft(s).
  - Facilitate all milestone activities as well as regular team check-ins.
  - Working with the PL, manage the key issues resolution plan to ensure timely resolution.

• **Technical Writing Services, including:**
  - Overall responsibilities for developing compelling and compliant technical proposal and presentation documents, as assigned.
  - Support writing, copy editing, and formatting for additional proposal efforts and support sections as a contributing writer.
  - Close collaboration with PL, Subject Matter Experts (SMEs), and partners/consultants to gather information needed to write assigned sections.
  - Coordinate efforts of contributing writers and SMEs contributing to assigned sections; integrate contributions into one, cohesive technical proposal that showcases our win strategy and meets client needs and solicitation requirements.
  - Incorporate draft and color review feedback from PL, Department Head (DH), and color reviewers into each draft iteration.
  - Draft sections and subsequent drafts that are compliant with solicitation, responsive to client needs, persuasive, and an excellent presentation of our win strategy.

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B. **DELIVERABLES**

Successful offeror’s will be responsible for quality deliverables on time per the requirements of the scope of work included in the Task Order.

III. **CONTRACT MECHANISM & TERMS OF PAYMENT**

ACDI/VOCA anticipates issuing a BPA to one or more Offerors.

Throughout the performance period of the BPA Contract, ACDI/VOCA will issue Task Orders. Preference will be to compete and issue Task Orders from all qualified BPA Contractors when the estimated value of the Task Order exceeds $30,000. ACDI/VOCA does reserve the right to issue Task Orders directly to one BPA Contractor without further competition when deemed in the best interest of ACDI/VOCA or its client. Competition will be conducted
under a Request for Quotation (RFQ). Issuance of Task Orders will be based on contracted rate and availability for services.

The contractor shall be paid, in the currency on the face of this Contract, within thirty (30) days after ACDI/VOCA’s receipt of an acceptable invoice and ACDI/VOCA’s acceptance of the completed products/services as described in the attached terms and conditions.

**IV. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS**

**A. INSTRUCTIONS FOR PROPOSAL PREPARATION**

The selection committee will evaluate the Offerors based upon their written technical and cost proposals. Each section will be evaluated according to the criteria for evaluations in Section V. Offerors are expected to examine all specifications and instructions in the RFP. Failure to do so is at the Offeror’s risk. Interested Offerors must provide the following, as applicable to service category of their interest:

1. **CAPABILITY AND TECHNICAL EXPERIENCE STATEMENT**

Demonstrate capabilities and technical experience by providing the following, as applicable, to service categories of interest:

**All Service Categories:**

a) Capabilities Statement: Provide an overview of the Offeror’s capabilities, experiences, resources, support, and any current/recent experience for conducting similar scopes of work as described in Section II A) Scope of Work. 2 pages maximum.

**Proposal and Capture Management Service Category:**

b) CV Review (as specified in Section IV A 2 Project Staffing) followed by a remote interview for finalists per review of CV.

**Technical Writing Service Category:**

c) Provide a writing sample, at least 2 pages in length, single spaced, that demonstrates technical writing competency, both technical expertise and persuasive writing ability (compelling, clear, compelling, concise, credible, and client focused) in the global development context.

**Editing and/or Proposal Production Service Categories:**

d) Completed turnaround timetable (below), as relevant to the services of interest:

<table>
<thead>
<tr>
<th>Editing Service requested</th>
<th># pages Offeror could complete in a day</th>
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<tbody>
<tr>
<td>Basic Editing Services only (as described in Section II (A) Scope of Work)</td>
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<tr>
<td>Substantive Editing Services (as described in Section II (A) Scope of Work)</td>
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<tr>
<th>Proposal Production Service requested</th>
<th># pages Offeror could complete in a day</th>
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<tbody>
<tr>
<td>Proposal Production Services only (as described in Section II (A) Scope of Work)</td>
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</table>

e) Editing and/or Production Test: Review and substantively edit the Editing and/or Production Test provided as an attachment to this RFP. All edits should be completed using tracked changes, and any comments should be made in comment bubbles.

2. **PROJECT STAFFING**

Identify no more than three (3) illustrative staff who will be available to perform each service under the scope of work your organization is submitting a response for. Provide a CV for each proposed individual that highlights all relevant experience.
Offeror’s must confirm the staff’s availability to work during normal business hours as well as nights and weekends. Offeror’s should provide the number of hours/days advance notice they require for night/weekend work assignments.

3. COST PROPOSAL

Offerors will submit a proposed budget with their proposals in a separate, sealed envelope (or separate file, if submitting via email) labeled “Budget Proposal.” The proposed budget will have sufficient detail to allow evaluation of elements of costs proposed. Budgets should be submitted in the currency in which your organization is located and will be paid; please label your budget with the name of the currency. ACDI/VOCA reserves the right to request any additional information to support detailed cost and price.

Offerors should include a proposed hour rate for all work outlined in Section II (A) Scope of Work. Cost per hour should be broken down in the following categories:

<table>
<thead>
<tr>
<th>Labor Category</th>
<th>Labor</th>
<th>Rate*</th>
<th>Hour or Daily</th>
<th>Annual Escalation Rate</th>
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<tbody>
<tr>
<td>Editing</td>
<td>Basic Editing Services – (Less than 48 hours’ advance notice)</td>
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<td>Basic Editing Services – (More than 48 hours’ advance notice)</td>
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<td>Editing</td>
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<tr>
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<tr>
<td>Management</td>
<td>Proposal and Capture Management Services</td>
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<tr>
<td>Writing</td>
<td>Technical Writing Services</td>
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<tr>
<td>Formatting</td>
<td>Proposal Production Services – (Less than 48 hours’ advance notice)</td>
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*Rates must be valid through December 31st, 2023.

4. REFERENCES

Please include three (3) client references and contact information. References should have worked with your organization within the past two (2) years in connection with the countries or regions (and if possible, technical topic areas) applicable to this RFP.
B. INSTRUCTIONS FOR SUBMISSION OF PROPOSAL

1. The technical and cost proposals shall be submitted separately via e-mail to Sharon Ball, Procurement Agent, SBall@acdivoca.org. The subject line of the email should be the Offeror’s name followed by ‘RFP No. A0072 2021 BDG BPA-001’. Each file shall be clearly identified with the Offeror’s name. All responses to this RFP must be received no later than the submission deadline on the cover page of this RFP. Faxed offers are not acceptable.

2. All inquiries and requests for information regarding this RFP must be submitted by email to the following individuals no later than the question/inquiry submission deadline on the cover page of this RFP. Reference the RFP number in all questions/inquiries.

<table>
<thead>
<tr>
<th>Name:</th>
<th>Sharon Ball</th>
<th>Clay Rogers</th>
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<tbody>
<tr>
<td>Email:</td>
<td><a href="mailto:sball@acdivoca.org">sball@acdivoca.org</a></td>
<td><a href="mailto:crogers@acdivoca.org">crogers@acdivoca.org</a></td>
</tr>
</tbody>
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3. ACDI/VOCA will not compensate Offerors for their preparation of responses to this RFP.

V. CRITERIA FOR EVALUATION

ACDI/VOCA will evaluate proposals based on a best-value determination; Offerors should submit their most competitive price proposal. Proposals will be evaluated using the following criteria per application category:

- **All Application Categories:**
  - Company capabilities / past performance
  - Proposed staff qualifications and availability of proposal staff to work non-traditional hours, such as evenings and weekends
  - Cost
  - Reference feedback on past work relevant to described scope

- **Capture and Proposal Management Services**
  - Degree of relevant experience demonstrated in CV and interview

- **Technical Writing Services**
  - Quality of Technical Writing Sample

- **Editing Services**
  - Quality of Editing Test

- **Production Services**
  - Quality of Production Test

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<tr>
<th>Technical Evaluation Matrix</th>
<th>Capture and Proposal Management Services</th>
<th>Technical Writing Services</th>
<th>Editing Services</th>
<th>Production Services</th>
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<tbody>
<tr>
<td>Maximum Score Possible</td>
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<tr>
<td>Score Breakdown:</td>
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<tr>
<td>Statement of Capabilities</td>
<td>20 pts</td>
<td>20 pts</td>
<td>20 pts</td>
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<tr>
<td>Proposed staff Qualifications and Availability</td>
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<td>15 pts</td>
<td>15 pts</td>
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<tr>
<td>Cost/Price</td>
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The evaluation committee will review the technical proposal based upon the technical criteria listed above. The cost proposals will be reviewed to ensure they are complete and free of computational errors. The committee will also assess the reasonableness of costs and the cost-effectiveness of the budget and will determine whether the costs reflect a clear understanding of project requirements. A contract will be offered to the responsible Offeror whose proposal follows the RFP instructions and is judged to be the most advantageous to ACDI/VOCA.

Offerors may submit a proposal to any or all of the services described in this RFP. Failure to submit an offer for all services will not negate an award and awards will be based solely on services described by the offeror.

VI. SOLICITATION PROCESS

Once the RFP is released, the Offerors must prepare a formal proposal to be sent to the contact person at ACDI/VOCA as indicated in Section IV B 1. The submitted proposals will be reviewed against the criteria for evaluation defined in Section V above and rated on their ability to satisfy the requirements stated in this RFP document. A preferred Offeror will be chosen and formally notified. A formal contract will be negotiated with the selected Offeror and, if endorsed, the Offeror will be eligible for work assignment under task orders. The award of a BPA Contract does not guarantee a minimum order. Ordering of services will only occur at the Task Order level. Task Orders may be subject to further competition through the use of an RFQ as described in Section III.

VII. TERMS AND CONDITIONS

A. LATE SUBMISSIONS

Proposals received after the submission deadline stated in the cover page of this RFP may not be considered. Offerors will be held responsible for ensuring their quotations are received according to the instructions stated herein. A late offer will be considered if the cause was attributable to ACDI/VOCA or its employees/agents, or if it is in the best interest of ACDI/VOCA.

B. MODIFICATION OF RFP REQUIREMENTS

ACDI/VOCA retains the right to terminate the RFP or modify the requirements upon notification to Offerors.

C. WITHDRAWALS OF PROPOSALS

Proposals may be withdrawn by written notice via email at any time before award. Proposals may be withdrawn in person by an Offeror or authorized representative, if the representative’s identity is made known and the representative signs a receipt for the proposal before award.

D. RIGHT OF NEGOTIATION AND ACCEPTANCE OF PROPOSAL

This RFP represents a definition of requirements and is an invitation for submission of proposals. ACDI/VOCA reserves the right to fund/award any or none of the submitted proposals. No commitment is made, either expressed or implied, to compensate Offerors for costs incurred in the preparation and submission of their proposal. ACDI/VOCA may reject any proposal that is nonresponsive. A responsive proposal is one that complies with all terms
and conditions of the RFP. A proposal must be complete, signed by an authorized signatory, and delivered no later than the submission time and date indicated on the cover sheet of this RFP. ACDI/VOCA may reserve the right to waive any minor discrepancies in a proposal.

ACDI/VOCA reserves the right to issue an award based on the initial evaluation of proposals without discussion. ACDI/VOCA also reserves the right to enter into best and final negotiations with any responsive Offerors for all or part of the proposed scope.

E. VALIDITY OF PROPOSAL

Proposals submitted shall remain open for acceptance for 60 days from the last date specified for receipt of proposals. This includes, but is not limited to, pricing, terms and conditions, service levels, and all other information. If your organization is awarded the contract, all information in the RFP and negotiation process is contractually binding.

F. MINIMUM OFFEROR QUALIFICATIONS

Offerors submitting proposals must (1) be officially licensed to do such business in the USA, (2) be able to receive USAID and/or USDA funds and (3) not have been identified as a terrorist. In addition, Offeror may be required to provide the following information:

- Documentation to verify licensure (e.g., tax id, registration certificate, etc.).
- Demonstration of adequate management and financial resources to perform the contract.
- Satisfactory records of performance history, integrity, and business ethics.

G. INTELLECTUAL PROPERTY RIGHTS

All tangible or intangible property created or acquired under this contract shall be the exclusive property of ACDI/VOCA and the donor. The term “property” includes all data and reports associated with this engagement. Reference is made to Article 8 in the business terms and conditions attached in Appendix A.

As per Terms and Conditions, Section 7, Proprietary Information & Confidentiality (see Appendix A), all communications between ACDI/VOCA and awardees will be considered confidential and proprietary.

VIII. ATTACHMENTS

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<tr>
<th>Appendix A</th>
<th>Blanket Purchase Order General Terms and Conditions</th>
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<tr>
<td>Appendix B</td>
<td>FAR and Supplemental Clauses</td>
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<td>Appendix C</td>
<td>Sample Invoice</td>
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<td>Appendix D</td>
<td>Technical Proposal Submittal Sheet</td>
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<td>Appendix E</td>
<td>Editing and Production Test</td>
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<td>Appendix F</td>
<td>Proposal Template for Production Test</td>
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<td>Appendix G</td>
<td>Solicitation Instructions for Production Test</td>
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Article 1. Period of Performance and Termination

(a) The period of performance of this BPA is as stated in Block I of the Specifications on the front page of this BPA Contract, unless terminated earlier by either Party hereto. The period of performance for each Work Order will be determined at the time of negotiation and award.

(b) Either Party may terminate this BPA Contract upon thirty (30) days’ prior written notice. In the event of a material breach of the BPA Contract by Consultant, or in the event that ACDI/VOCA’s Client terminates ACDI/VOCA’s Prime Award, ACDI/VOCA’s client does not approve ACDI/VOCA’s Consultant, or Consultant is subject to any Suspension/Debarment or other action by the USG, ACDI/VOCA may terminate this BPA Contract immediately. In the event of termination of this BPA Contract, payment shall be made by ACDI/VOCA for reasonable costs incurred by BPA Contractor for any Work Orders issued up to the effective date of the termination.

(c) This BPA Contract may be amended, altered or changed only by a written modification signed by both Parties.

(d) ACDI/VOCA shall retain the right to direct Consultant to stop work (“Suspension”) on any Work Order at any time. Such direction must be in writing and shall be effective for a period of no more than 30 days after which time Consultant may continue work absent direction to do so or a notice of termination at their own risk. Under no circumstances shall Consultant receive more than the original value of any issued Work Order.

“Termination”: ACDI/VOCA reserves the right to terminate Work Orders when: (1) deemed in the best interests of its client; or (2) if the Consultant defaults in performing any Work Order and fails to cure the default within 10 days after receiving a notice specifying the default. ACDI/VOCA shall be liable only for payment under the payment provisions of this BPA Contract and individual Work Orders for services/deliverables completed and accepted before the effective date of termination. Payments for partial deliverables shall not be made unless explicitly authorized by ACDI/VOCA in the Termination Letter. This paragraph shall not limit any legal rights to cancel any Work Order without further liability for articles not accepted by ACDI/VOCA. Work Orders Issued may be terminated at any time in the event Consultant is subject to any Suspension/Debarment or other action by the USG or ACDI/VOCA’s client, including Termination for Convenience by the USG or the client of ACDI/VOCA. Consultant may be liable to reimburse ACDI/VOCA should ACDI/VOCA incur any additional costs as a direct result of such default termination.

Article 2. Scope of Services

Consultant shall perform the services as set forth in the Statement of Work attached to each Work Order issued. Consultant agrees that he/she shall make himself/herself available to the best of their ability to perform requested Services. Consultant agrees at all times to provide the Services in a timely and professional manner based on ACDI/VOCA’s needs.

Article 3. Compensation

(a) ACDI/VOCA will compensate Consultant at the hourly rate, fixed daily rate or fixed reimbursement rate provided in Block II of the Specifications on the front page of this BPA Contract for time devoted to the Services authorized in issued work orders, and will reimburse the Consultant for such travel and other expenses as have been authorized in advance and included in work orders. The total amount of compensation to Consultant under this BPA, including authorized travel expenses and/or approved other direct costs, shall not exceed the amount in Section IV or V of the Specifications on the front page of this BPA depending on the contract type. If the compensation rate is specified as a “daily rate", the Consultant must perform Services at least eight (8) hours on that particular day; otherwise, the day is treated as a partial day. Partial days shall be compensated on an hourly basis calculated by dividing the daily rate by eight (8)]. ACDI/VOCA shall make any payments due for Work Orders Issued under this BPA Contract within thirty (30) calendar days after its receipt of a proper invoice from Consultant provided such invoice from Consultant conforms to the sample invoice attached as Appendix B. To ensure payment, unless otherwise specified by the Project Manager, invoices must be submitted monthly within 30 days from the end of the monthly billing period. The final invoice must be submitted to ACDI/VOCA within 30 days of the effective end date or termination of work orders issued under this BPA Contract and must be clearly marked as a “final invoice”. Failure to submit invoices by these deadlines risks nonpayment. ACDI/VOCA must have a fully-signed copy of this BPA Contract, each associated Work Order, and other required
documents on file in order for invoices to be paid. Dates of service on the invoice must be within the dates as outlined in Article 1.

(b) All travel costs incurred under Work Orders issued shall be in accordance with the Federal Acquisition Regulations, as codified in Title 48 of the Code of Federal Regulations (“FAR”) and FAR Supplementary Regulations.

c) All taxes applicable to the proceeds received by Consultant shall be the liability of Consultant, and ACDI/VOCA shall not withhold nor pay any amounts for federal, state or municipal income tax, social security, unemployment or workman’s compensation unless required by law. ACDI/VOCA shall withhold and remit any amount, regardless of its description as a tax or otherwise, in countries where local laws require that such amounts be withheld and timely remitted by ACDI/VOCA. In accordance with law, ACDI/VOCA shall annually file with the Internal Revenue Service, or any other tax agency, whether domestic or not, any applicable tax forms reflecting the gross annual payments made by ACDI/VOCA to Consultant. Gross annual payments shall be the total compensation for labor and reimbursement of expenses; therefore, it is the Consultant’s responsibility to retain copies of expenses incurred during the performance of Services under this BPA Contract for tax reporting purposes. It is the Consultant’s responsibility to determine if a value added tax (VAT) is applicable to services provided to ACDI/VOCA, and to timely remit the VAT charged to ACDI/VOCA per the invoicing instructions included in Paragraph A of this Article. The invoice tendered to ACDI/VOCA for payment shall comply with the applicable local country’s VAT regulations.

Article 4. Project Manager
ACDI/VOCA designates the individual named in Block VII of the Specifications on the front page of this BPA Contract as the ACDI/VOCA Project Manager for Services under this BPA Contract. The ACDI/VOCA Project Manager shall also be responsible for determining whether Consultant has satisfactorily delivered the Services as specified in each Work Order Scope of Work and will be responsible for review and approval of invoices submitted to Accounts Payable by Consultant.

Article 5. Confidentiality
(a) It is understood that, during the course of this BPA Contract and/or in performing the Services under individual Work Orders, Consultant may be exposed to or receive proprietary information, technical data, or know-how, including, but not limited to, that which relates to research, product plans, products, services, customers, markets, developments, inventions (whether patentable or not), processes, designs, drawings, strategies, marketing, advertising and/or finances which is confidential to ACDI/VOCA (hereinafter “Confidential Information”). All Confidential Information, written or verbal, made available, disclosed or otherwise known to Consultant as a result of this BPA Contract and associated Work Orders shall be considered the sole property of ACDI/VOCA and/or ACDI/VOCA’s Client. Confidential Information may be used by Consultant only for purposes of performing the Services or other obligations hereunder. Both during the term of this BPA Contract, the term of each Work Order, and at all times thereafter, Consultant shall not reveal, publish or otherwise disclose Confidential Information to any third party without the prior written consent of ACDI/VOCA.

(b) Upon termination of this BPA Contract and any associated Work Orders, Consultant agrees to return all Confidential Information to ACDI/VOCA. Consultant agrees that the terms of this BPA Contract shall be treated as Confidential Information of ACDI/VOCA.

c) In accomplishment of research projects, ACDI/VOCA guarantees confidentiality to its commercial clients. Therefore, in accomplishment of, and/or in connection with, work authorized under a BPA Contract which ACDI/VOCA has with a commercial concern, Consultant agrees not to reveal the identity of the commercial client in any manner whatsoever without specific approval of ACDI/VOCA. Furthermore, Consultant shall not publish or make known to others the subject matter of any information developed in performance of Services under this BPA Contract, without first having obtained the approval of the President of ACDI/VOCA or her designee/nominee.

(d) Information excluded from this Article 5, is as follows: 1) information that comes into the public domain other than through breach of this agreement; 2) was known by Consultant (as established by Consultant’s own records or other competent proof before the disclosure); 3) lawfully comes into the possession of Consultant from a third party who is not under an obligation to keep such information confidential; or 4) the disclosure of which is required by law, by any court of competent jurisdiction or by any official regulatory body.
Article 6. Representations; Conflicts of Interest
(a) Consultant represents that he/she is not under any BPA Contractual obligation with his or her current employer or with any other entity that would interfere with or otherwise impair his or her ability to perform the Services hereunder.

(b) In the performance of the Services, Consultant represents and agrees that he/she will not disclose to ACDI/VOCA any information or perform any work which would violate any BPA Contractual or legal obligation he/she has with his/her current employer or with any other entity.

(c) Consultant affirms that to the best of his/her knowledge no actual or potential conflict of interest exists between Consultant, Consultant’s family, business or financial interests and the Services provided under this BPA Contract. In the event of a change in Consultant’s private interest that has potential for conflict of interest with the Services under this BPA Contract, Consultant will promptly notify ACDI/VOCA. At ACDI/VOCA’s request, Consultant shall complete ACDI/VOCA’s Conflict of Interest training and submit a Significant Financial Interest disclosure form prior to beginning work and either annually thereafter or as new reportable Significant Financial Interests are obtained, whichever occurs first.

(d) Consultant agrees that if an actual or potential conflict of interest is discovered after award, Consultant will make a full disclosure in writing to ACDI/VOCA. This disclosure shall include a description of activities that Consultant has taken or proposes to take, after consultation with ACDI/VOCA, to avoid, mitigate, or neutralize the actual or potential conflict.

(e) ACDI/VOCA may terminate this BPA Contract and any associated Work Order immediately if it deems such termination necessary to avoid a conflict of interest. If Consultant was aware of a potential conflict of interest prior to award, or discovered an actual or potential conflict after award and did not disclose or misrepresented relevant information to ACDI/VOCA, ACDI/VOCA may terminate the BPA Contract immediately for default, and/or pursue such other remedies as may be permitted by law or this BPA Contract.

Article 7. Employment Status and Privity
(a) Consultant hereby certifies that he/she is an independent Contractor and not an employee of ACDI/VOCA under applicable Internal Revenue Service (IRS) or federal or state labor provisions, and Consultant shall have no right to participate in any employee benefit plan offered by ACDI/VOCA.

(b) In accepting this BPA Contract, the Consultant certifies that neither it is not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this type of transaction by any Federal department or agency. Any change in the debarred or suspended status of the Consultant during the life of this BPA Contract must be reported immediately to ACDI/VOCA. Consultant agrees to incorporate this Debarment and Suspension certification into any lower-tier BPA Contract that it may enter into as a part of this BPA Contract.

(c) ACDI/VOCA shall neither exercise nor have any right to control the Consultant as to the means by which the Consultant’s Services are to be accomplished.

(d) No privity between Consultant and ACDI/VOCA’s Client, including the Federal Government is established by this BPA Contract. All communications regarding this BPA Contract must be directed only to ACDI/VOCA.

Article 8. Intellectual Property Ownership
(a) Consultant agrees that all inventions, work product, deliverables or any other information, know-how or material that is created for, or provided to, ACDI/VOCA by Consultant under this BPA Contract (“Invention(s)”) and associated Work Orders, including any background information necessary to practice such Inventions, shall be the sole and exclusive property of ACDI/VOCA or its assignees, and Consultant will and hereby does assign to ACDI/VOCA all rights in and to such Inventions upon the creation of any such Invention, including without limitation (i) patents, patent applications, and patent rights throughout the world; (ii) rights associated with works of authorship throughout the world, including copyrights, copyright applications, copyright registrations, mask work rights, mask work applications and mask work registrations; (iii) rights relating to the protection of trade secrets and confidential information throughout the world; (iv) rights analogous to those set forth herein and any other proprietary rights relating to intangible property, including trademarks, service marks, and the like; and (v) divisions, continuations, renewals, reissues and extensions of the foregoing (as applicable) now existing or hereafter filed, issued or acquired (collectively, "IP Rights").
ACDI/VOCA and its nominees shall have the right to use and/or to apply for statutory or common law protections for such Inventions in any and all countries.

(b) If the Inventions include any software, then such Invention shall be deemed to include, in both source code and object code forms, the final version and all intermediate versions for the software and all routines and subroutines, as well as all program materials, flowcharts, notes outlines, work papers and the like created or developed in connection therewith, the resulting screen formats and other visual effects of the software, and any formulae, processes, algorithms, ideas, and other information not generally known to the public, whether or not protected by copyright, which are developed or generated by Consultant in the course of performing the Services.

(c) Any computer program or report, or any portions thereof, prepared by Consultant pursuant to this BPA Contract or which discusses the Invention(s), Services performed under this BPA Contract or the results thereof (the “Written Data”) shall be and is produced as a “work made for hire” under the copyright laws of the United States. As a “work made for hire”, the copyrights in the Written Data shall belong to ACDI/VOCA from their creation and no further action by ACDI/VOCA shall be necessary to perfect ACDI/VOCA’s rights therein. All right, title and interest, including any copyright in and to any Written Data that does not qualify as a “work made for hire” shall be and hereby is assigned to ACDI/VOCA. Consultant, without additional compensation, will assign the copyright in all Written Data to ACDI/VOCA, as soon as it is fixed and the copyright comes into being. In addition, Consultant agrees to assist ACDI/VOCA in taking any subsequent legal steps that may be required to perfect ACDI/VOCA’s copyrights in this Written Data including, but not limited to, executing a formal assignment of copyright that can be recorded.

(d) Consultant shall restrict disclosure of Confidential Information within its organization to those persons having a need to know for purposes of this BPA Contract, and such persons shall be advised of the obligations set forth in this BPA Contract and shall be obligated in like manner.

Article 9. Standards of Ethics and Business Conduct
(a) ACDI/VOCA has established very high ethical standards for our employees. ACDI/VOCA considers adherence to the ACDI/VOCA Code of Conduct as well as strict observance of all applicable U.S. and non-U.S. laws and regulations to be not only a legal requirement but more than that, an ethical obligation for all. While performing as an ACDI/VOCA Consultant, Consultant is expected to adopt and comply with these same standards. As a result, this BPA Contract incorporates by reference, with the same force and effect as if it was given in full text, ACDI/VOCA’s “Code of Conduct.” Upon request, ACDI/VOCA can provide paper copies of these standards.

(b) If Consultant has a good faith reason to believe that any violation of the Code of Conduct has been committed by an employee(s) of ACDI/VOCA, Consultant shall report such violation to ACDI/VOCA. Please find ACDI VOCA’s ethics reporting procedures and options at https://www.acdivoca.org/ethics-at-acdi-voa-affiliates/.

Article 10. Insurance
Consultant shall maintain adequate insurance coverage, which shall include:

a) Commercial general liability in the amount of USD 500,000 per occurrence;
b) Commercial automobile liability in the amount of USD 500,000 combined single limit, with respect to automobiles operated in the performance of services; and,
c) If relevant to the nature of services provided, professional liability in the amount of USD 500,000 per occurrence.

Upon request, Consultant agrees to provide ACDI/VOCA with a Certificate of Insurance as evidence that the Consultant has procured and currently maintains the required insurance as outlined above.

For each Work Order issued, ACDI/VOCA will maintain appropriate foreign workers’ compensation insurance to include the Consultant. Such workers’ compensation insurance will be specific to the appropriate statutory or voluntary workers’ compensation scheme applicable to the ACDI/VOCA project for which the Services BPA Contracted herein are performed. The insurance coverage will apply only to the work performed by the Consultant for ACDI/VOCA under this BPA Contract and will not extend to work performed by the Consultant for other parties.

Article 11. Indemnity

11
Consultant shall be responsible for all losses, costs, claims, causes of action, damages, liabilities and expense, including attorney’s fees, all expense of litigation and/or settlement, and court costs, arising from any act or omission of Consultant, its officers, employees, agents, or consultant/suppliers at any tier, in the performance of any of its obligations under this Article.

**Article 12. Infringement Indemnity**

In addition to any other warranty by Consultant against infringement, statutory or otherwise and to the extent permitted by law, Consultant shall defend at his or her expense, any suit against ACDI/VOCA or any client of ACDI/VOCA based on a claim that any item furnished by Consultant under this BPA Contract or the normal sale thereof infringes any U.S. Letters patent or copyright, and shall pay costs and damages finally awarded in any such suit, provided that Consultant is notified in writing of the suit and given authority, information, and assistance at Consultant’s expense for the defense of same. If the use or sale of said item is enjoined as a result of such suit, Consultant, at no expense to ACDI/VOCA, shall obtain for ACDI/VOCA and for any client identified by ACDI/VOCA the right to use and sell said item or shall substitute an equivalent item reasonably acceptable to ACDI/VOCA and extend this patent indemnity thereto.

**Article 13. Assignability**

Consultant shall not assign or subcontract any portion of this agreement, its duties and/or obligations hereunder unless ACDI/VOCA, in its sole discretion, grants Consultant written permission to do so.

**Article 14. Limitation on Liability**

In no event shall ACDI/VOCA be liable to Consultant, (a) in the aggregate for any claim, damage, injury or loss of any nature arising out of or related to this BPA Contract or any associated Work Orders in excess of the maximum amount which ACDI/VOCA agreed to pay Consultant, as specified in Article 3, for the Services giving rise to the claim, damage, injury or loss, or (b) for any incidental, consequential, special, punitive or indirect damages.

**Article 15. Electronic BPA Contracting**

The Parties agree that if this BPA Contract is transmitted electronically neither Party shall contest the validity of this BPA Contract, or any acknowledgement thereof, on the basis that this BPA Contract or acknowledgement contains an electronic signature.

**Article 16. Federal Acquisition Regulation Clauses and Supplements (if BPA Contract is Federally-funded)**

When this BPA Contract and associated Work Orders are Federally-funded, Consultant shall perform the Services in accordance with the FAR and FAR Supplementary Regulations in Appendix A. These clauses are attached hereto and incorporated herein by reference.

**Article 17. Governing Law**

This BPA Contract shall be construed and interpreted in accordance with the laws of the District of Columbia, USA, excluding that body of law known as choice of law, and shall be binding upon the Parties hereto in the United States and worldwide.

**Article 18. Survivability**

If this BPA Contract is completed, or is terminated, Consultant shall not be relieved of those obligations that, by their language, by implication, or by operation of law, necessarily continue beyond completion, or termination of this BPA Contract, including but not limited to the following provisions:

- Governing Law
- Federal Acquisition Regulation flow-down clauses that by their nature should survive (applicable only if this BPA Contract is Federally-funded)
- Electronic BPA Contracting
- Confidentiality
- Export Control
- Intellectual Property Ownership
- Indemnity
- Infringement Indemnity
- Use of Name

**Article 19. Use of Name**
The Parties each agree not to use the other Party’s name, or make any reference to the other Party or any of its employees for advertising, publicity or any purpose whatsoever, whether or not related to this BPA Contract, unless such use of name and/or related materials have been previously approved in writing by the other Party. The provisions of this Article shall survive the termination of this BPA Contract.

Article 20. Disputes
(a) Any dispute arising under this BPA Contract or any associated Work Orders shall be settled by mutual agreement of the parties or pursuant to Paragraph B below.
(b) If the parties cannot resolve the dispute amongst themselves within a reasonable time, the parties may, by mutual agreement, settle such dispute by arbitration in accordance with the Rules of the American Arbitration Association in the District of Columbia, USA, and judgment upon the award rendered by the arbitrators may be entered in any court having jurisdiction.
(c) Pending completion of the portion of the Statement of Work under dispute, or final resolution of a dispute which releases Consultant from performance hereunder, the Consultant shall, at all times, proceed diligently with the performance of the BPA Contract.

Article 21. Order of Precedence
Any inconsistency in this BPA Contract shall be resolved by giving precedence in the following order:
1. Articles of this BPA Contract cited herein;
2. Federal Acquisition Regulation (FAR) and Supplemental Acquisition Clauses, Appendix A (applicable only if this BPA Contract is Federally-funded)
3. Statement of Work, Appendix C; and
4. any and all other attachments incorporated herein by reference.

APPENDIX B. FAR AND SUPPLEMENTAL CLAUSES

INCLUDE THIS SECTION ONLY TO CONTRACTS AND WORK ORDERS UNDER U.S. GOVERNMENT PRIME CONTRACTS.

The FAR clauses cited below, where applicable by their terms, are incorporated herein by reference as if set forth in full text. The full text of all clauses incorporated by reference is available at http://www.acquisition.gov/. The effective version of each FAR clause shall be the same version as that which appears in ACDI/VOCA’s prime Contract, or Subcontract under which this agreement and any associated Work Orders are issued.

General Information:
1. When the materials or products furnished are for use in connection with a U.S. Government Contract, in addition to ACDI/VOCA’s General Terms and Conditions, the following provisions shall apply, as required by the terms of the prime Contract, or by operation of law or regulation. Otherwise, ACDI/VOCA’s General Terms and Conditions shall govern in the event of a conflict between these FAR provisions and ACDI/VOCA’s General Terms and Conditions.
2. Clauses in this document may not be applicable to specific orders due to the type of Contract to be issued, dollar thresholds under requirements of the FAR, or Public Law or Mandatory Flow Down requirements of a particular prime Contract. Clauses that are not applicable are deemed self-deleting, shall not be removed from this document, and will be considered by all parties to be without force and effect. It is the BPA Contractor’s obligation to contact ACDI/VOCA regarding any confusion, ambiguity, or questions the BPA Contractor may have regarding applicability of the following clauses.
3. For purposes of this BPA Contract, in all applicable clauses, the term “Contractor” shall mean the BPA Contractor performing Work Orders under this BPA Contract, the term “Contract” shall mean this BPA Contract, and the terms “Contracting Officer,” “Project Officer” and equivalent phrases shall mean ACDI/VOCA’s authorized representative.

<table>
<thead>
<tr>
<th>The following clauses apply to all Contracts.</th>
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<td>52.202-1</td>
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<td>52.203-13</td>
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<td>52.247-64</td>
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**Sample Invoice**

<table>
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<tr>
<th><strong>Date of Invoice</strong></th>
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<tbody>
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<td><strong>Invoice Number</strong></td>
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<td><strong>BPA Contract ID</strong></td>
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<td><strong>Work Order Number</strong></td>
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<tr>
<td><strong>Consultant’s Full Name</strong></td>
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<tr>
<td><strong>Consultant’s Mailing Address</strong></td>
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</tbody>
</table>

**Total Work Order Value:**
**Total of Previously Invoiced Amounts:**
**Current Invoice Amount:**
**Work Order Balance Remaining:**

Contractor hereby certifies providing the deliverables, goods or services, or performing the labor, claimed in this invoice in fulfillment of the Specifications or Scope of Work in the Independent BPA Contractor Agreement indicated above. The certified time record is attached to this invoice for labor cost along with documentation of reimbursable costs (if applicable) as listed below:

<table>
<thead>
<tr>
<th>ITEM</th>
<th>UNIT</th>
<th>AMOUNT</th>
<th>TOTAL</th>
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<tr>
<td>Deliverables</td>
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<td><strong>OR</strong></td>
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<tr>
<td>Labor</td>
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<tr>
<td>Reimbursable Costs (Specify)</td>
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**TOTAL INVOICE**

Certified by BPA Contractor:

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<tr>
<th>Signature:</th>
<th></th>
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<tbody>
<tr>
<td>Name:</td>
<td></td>
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<tr>
<td>Title:</td>
<td></td>
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<tr>
<td>Date:</td>
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</tr>
</tbody>
</table>

Notes:
Attach the certified time record and documentation of reimbursable costs to this invoice. Failure to provide the required invoice information above will be cause for the invoice to be returned to the BPA Contractor for correction, which may cause delay in payment.
APPENDIX D. TECHNICAL PROPOSAL SUBMITTAL SHEET

(Complete this form with all the requested details and submit it as the first page of your technical proposal, with the documents requested above attached. Ensure that your proposal is authorized in the signature block below. A signature and authorization on this form will confirm that the terms and conditions of this RFP prevail over any attachments. If your proposal is not authorized, it may be rejected.)

<table>
<thead>
<tr>
<th>Date of Technical Proposal:</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Number:</td>
</tr>
<tr>
<td>RFP Title:</td>
</tr>
</tbody>
</table>

We offer to provide the goods/services described in the Scope of Work, in accordance with the terms and conditions stated in Request for Proposal referenced above. We confirm that we are eligible to participate in public procurement and meet the eligibility criteria specified.

The validity period of our proposal is XX days/weeks/months from the time and date of the submission deadline.

TYPE OF BUSINESS/INSTITUTION (CHECK ALL THAT APPLY)

Offeror certifies that it is:  ☐ Non U.S. Owned/Operated  ☐ Government Owned/Operated

(If Non U.S. Owned/Operated is selected, continue to Anti-Terrorism Certification)

OR FOR US ORGANIZATIONS ONLY:

☐ Nonprofit   ☐ For-Profit   ☐ Government Owned/Operated
☐ Large Business   ☐ Small Business   ☐ College or University
☐ Women Owned   ☐ Small and Disadvantaged Business

ANTI-TERRORISM CERTIFICATION

The Offeror, to the best of its current knowledge, did not provide, within the previous 10 years, and will take all reasonable steps to ensure that it does not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitated, or participated in terrorist acts.


The undersigned declares s/he is authorized to sign on behalf of the company listed below and to bind the company to all conditions and provisions stated in the original RFP document including attachments from ACDI/VOCA.

Proposal Authorized By:

Signature: ___________________________ Name: ___________________________
Position: ___________________________ Date: ___________________________

Authorized for and on behalf of: ___________________________ (DD/MM/YY)
Company: ___________________________________________________________
Address: ___________________________________________________________
DUNS No.: ___________________________ Business Registration No. _________________
This is provided as an attachment.
## TABLE OF CONTENTS (HEADING STYLE 1 – NO TOC)

1. EXECUTIVE SUMMARY .................................................................................................................................. 2  
   Life of Project Summary ................................................................................................................................. 2  
   Key Summary of Project ............................................................................................................................... 2  
   Year Four Performance Dashboard ............................................................................................................... 4  

### ANNEXES (bold, 12pt, TNR)

A. ANNEX 1 TITLE
1. EXECUTIVE SUMMARY

This is the fourth semiannual report for the [DONOR] [PROJECT TITLE] No. [###-###-####] with ACDI/VOCA in Jamaica. This report also provides a final technical and performance summary on the outputs and outcomes of the [PROJECT TITLE] [PROJECT ACRONYM] project. The goal of the four-year project is “increased climate change resilience for targeted livelihoods and ecosystems.”

YEAR 4 SUMMARY

In year four (October 1, 2018 to March 31, 2019), the [PROJECT ACRONYM] project supported 267 persons (126 males, 137 females, and 4 unstated) in parishes such as [TOWN], [TOWN], and [TOWN], through its capacity building trainings, technical assistance and livelihood expansion, and climate and disaster risk reduction (DRR) grants. Training covered topics such as agricultural data management and analysis for cassava production, micro-finance branch management best practices, agricultural credit risk assessment for targeted microfinance institutions, youth micro-business development, and climate and disaster risk screening and strategic planning within local authorities. Pre-audit assessment for two post-harvesting facilities (honey and food crops) were conducted by the [PARTNER ORGANIZATION]. In addition, dairy farmers around Jamaica now have access to the latest silage making technology that will help them to provide adequate nutrition to livestock, especially during times of drought. 157 persons (81 males and 76 females) are now using climate information or implementing risk reducing actions following [PROJECT ACRONYM] support. Risk reduction actions taken included installation of water storage tanks in drought-affected household, and household connection of pipes, into their kitchens and bathrooms, from community water line improvements.

41 farmers and community members have gone on to adopt one or more improved best practice especially in the areas of improved business management and water harvesting and management technology. Year four donor investments were matched by a total of U$30,800 in cash and in-kind partner and beneficiary contributions, that complemented the climate-smart activities implemented. Most notable was the U$19,000 USD in public domestic funds leveraged through [PARTNER ORGANIZATION] as a complement to [PROJECT ACRONYM] grant assistance. Through the technical assistance provided by [PROJECT ACRONYM], the [PARTNER ORGANIZATION] has sought and obtained U$5450 in public domestic funds through a local funding agency to further enhance the water harvesting system in their community. 45 institutions have increased capacity to mitigate and manage the effects of climate change. The project has improved the capacity of 25 financial institutions through trainings and resource material that have increased the branch managers’ ability to train loan officers to better evaluate credit risks associated with agricultural production. In addition, [PROJECT ACRONYM] built the capacity within 16 sub-national institutions that deliver climate-resilience support services across the island. [PROJECT ACRONYM] improved the human resource of the [PARTNER ORGANIZATION] across the island by building the capacity of the CEOs in developing strategic plans with improved consideration to risks associated with climate and disaster.

Two [PARTNER ORGANIZATION] have formally proposed to adopt the strategy provided in the climate and disaster risk screening tool user guide. The guide was developed to outline the process and proposed entry point for climate proofing development plans being considered for approval at the sub-national level.

LIFE OF PROJECT SUMMARY

KEY SUMMARY OF PROJECT

From October 1, 2015 to March 31, 2019 the [PROJECT ACRONYM] project helped 3,257 persons (producers, marketers, community members, extension service providers, youths) to take actions that
build their resilience to climate change related challenges. The capacity building support included training on climate risk identification, and the application of innovation and risk reduction best practices for agribusiness, watershed communities and supporting institutions. Over 800 community members and others went on to implement one or more risk reduction action through grant and private sector support in their homes, businesses and institutions. Across all components and activities, the [PROJECT ACRONYM] project successfully leveraged US$1.16 million through its network of partners and beneficiaries for climate-smart projects such as water harvesting, storage and distribution, waste management and recycling, agribusiness investments in cassava, pineapple and honey, and youth climate change advocacy and action.

215 project partners and beneficiaries involved in the pineapple, cassava, breadfruit, and apiculture value chains used grant funding and financing from the market system to facilitate application of improved updated agricultural technology, crop care best practice and innovation. These on-farm investments were facilitated by an estimated USD $400,000 in agriculture credit provided by MFIs to farmers and agri-business to support crop production technology improvement (including water management), crop care and management and marketing. In areas such as the [RIVER] watershed Over 5,230 fruit trees such as breadfruit, avocado, lychee, and nutmeg, along with 73,900 pineapple suckers, and 800 mangrove seedlings were planted by project partners in the upper and lower reaches. Over time these plantings will provide future soil cover and be a source of food and livelihood for rural households. Other risk reduction actions included the adoption of land husbandry innovation and best practices, and the harvesting of water for domestic and agriculture use.

The many outputs and accomplishments reported were done in partnership with several local, regional and national institutions. This included the 160 government, non-government and private sector institutions that are now systematically integrating climate and disaster risk considerations and best practice application at the local, regional and national levels. For each institution the project assisted them to achieve their core mandates of community development, local development, agricultural lending, or extension delivery – while equipping them with decision-support tools, assessments and process improvements that also consider climate risks.

PROJECT TRANSITION AND SUSTAINABILITY ACTIONS
In anticipation of the March 31, 2019 closure of the [PROJECT ACRONYM] project, several actions were taken to consolidate the donor investments made from years one to three; and transition implementation to one or more of the lead partners.

To support continued financial inclusion of agriculture micro-business enterprises beyond the [PROJECT ACRONYM] life, the project worked with three micro-finance institutions (MFIs) – the[PARTNER ORGANIZATION], the [PARTNER ORGANIZATION] and the [PARTNER ORGANIZATION] to ensure capacity to assess agricultural credit risk and develop new loan products for the agricultural sector was firmly entrenched. To continue the capacity building for farmers to improve their business management skills, capacity to lead future farming as a business training (FaaB) was successfully transferred to RADA; evidenced by RADA’s lead in training and graduating over 400 farmers in 2018.

The project also successfully completed the handover of the expanded Building (Climate) and Disaster Resilient Communities (BDRC) process – that now includes systemic steps and tools to integrate climate risk considerations in the preparation of community disaster risk management (CDRM) plans by the [PARTNER ORGANIZATION] and the parish disaster coordinators. The [PARTNER ORGANIZATION] and [PARTNER ORGANIZATION] are also now able to systematically integrate climate risk considerations in development approval decisions as well as strategic plan development using the [PROJECT ACRONYM] – developed [TOOL NAME]. Each
council has senior managers and technical staff trained to utilize [TOOL NAME].

**Major Lessons Learned.** Through the project’s experience we can learn that true adoption and transformation takes time, and really occurs when government, NGO or private sector partners makes the adjustment in their internal processes. Donor driven changes that are not institutionalized at project closeout are at risk of being shelved with staffing transitions and changing organizational priorities. It is also recognized that innovative partnerships – with government and private sector – expands the project’s capacity to do more. It is also noted that the partnerships not only leverage financial resources, but also technical expertise and training that can last beyond the [PROJECT ACRONYM] project life. The use of partnership however, requires the implementation team to think outside of the box – and be flexible enough to recognize and take advantage of opportunities when they arise. Other lessons learned include the need for capacity building to support best practice adoption and replication across organizations and communities, the importance of people-centered program and activity design that aligns with needs and priorities, and the value of the market system approach in building priority agricultural value chains.

**Year Four Performance Dashboard**

For Year four, the project met and exceeded all four semiannual targets as shown in the table below.

<table>
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<tr>
<th>Regions</th>
<th>Persons Reached</th>
<th>Totals</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Men</td>
<td>Women</td>
<td></td>
</tr>
<tr>
<td>[Region A]</td>
<td>111</td>
<td>111</td>
<td>222</td>
</tr>
<tr>
<td>[Region B]</td>
<td>222</td>
<td>222</td>
<td>444</td>
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<tr>
<td>[Region C]</td>
<td>333</td>
<td>333</td>
<td>666</td>
</tr>
<tr>
<td>[Region D]</td>
<td>444</td>
<td>444</td>
<td>888</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>1,111,</strong></td>
<td><strong>1,111</strong></td>
<td><strong>2,222</strong></td>
</tr>
</tbody>
</table>

**Lessons Learned**
- True adoption and transformation takes time
- Occurs when government, NGO or private sector partners makes the adjustment in their internal processes
- Donor driven changes that are not institutionalized at project closeout are at risk of being shelved with staffing transitions and changing organizational priorities
- Innovative partnerships – with government and private sector – expands the project’s capacity to do more
APPENDIX F. PROPOSAL TEMPLATE FOR PRODUCTION TEST

This is provided as an attachment.
# TABLE OF CONTENTS (HEADING STYLE 1 – NO TOC)

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>List of Acronyms (if it is not its own annex)</td>
<td>II</td>
</tr>
<tr>
<td>Executive Summary (TNR, 12pt, White, bold, all caps) Heading 1</td>
<td>1</td>
</tr>
<tr>
<td>I. Alternative heading 1 style when numbering is used (numbered heading 1)</td>
<td>1</td>
</tr>
<tr>
<td>Heading Level 1, White on Teal, All Caps, Bold</td>
<td>1</td>
</tr>
<tr>
<td>Heading Level 2, Teal, Small Caps, Bold</td>
<td>1</td>
</tr>
<tr>
<td>Heading Level 3, Teal, Small Caps</td>
<td>1</td>
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<tr>
<td>Goals and Objective of the Program (Heading 2)</td>
<td>1</td>
</tr>
<tr>
<td>Heading Level 3</td>
<td>1</td>
</tr>
<tr>
<td>Annexes (bold, 12pt, TNR)</td>
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</tr>
<tr>
<td>A. Annex 1 Title</td>
<td></td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>WFP</td>
<td>World Food Programme</td>
</tr>
</tbody>
</table>
EXECUTIVE SUMMARY (TNR, 12PT, WHITE, BOLD, ALL CAPS) HEADING 1

I. ALTERNATIVE HEADING 1 STYLE WHEN NUMBERING IS USED (NUMBERED HEADING 1)

HEAD LEVEL 1, WHITE ON TEAL, ALL CAPS, BOLD
HEAD LEVEL 2, TEAL, SMALL CAPS, BOLD
HEAD LEVEL 3, TEAL, SMALL CAPS
Heading Level 4, Dark Grey, Bold Italic
Heading Level 5, Dark Grey, Bold

GOALS AND OBJECTIVE OF THE PROGRAM (HEADING 2)

Basic sample text, TNR 11, left aligned, 6pt paragraph spacing (after).


Figure X. Arial, 9pt font, bold, Dark Gray (RGB #79, 78, 86) left aligned

<table>
<thead>
<tr>
<th>GOAL</th>
<th>Purpose</th>
<th>Outcome</th>
<th>Output</th>
<th>Activity Results</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Income</td>
<td>Small, marginal, and homestead farmers have increased yields due to use of good quality seed</td>
<td>Farmers increase use of quality seeds</td>
<td>Farmers have increased access to quality vegetable seed</td>
<td>Companies are able to promote and distribute quality vegetable seeds to small, marginal &amp; homestead farmers through networks of knowledgeable dealers, retailers, MSVs</td>
<td>Facilitated two seed companies to assess market, develop strategic plan &amp; packaging for promoting vegetable seeds in mini packs</td>
</tr>
</tbody>
</table>


Praesent accumsan at nisi vitae iaculis. Pellentesque at erat leo. Ut vel rutrum metus. Quisque vestibulum arcu id risus dapibus dignissim. Quisque eleifend justo ac lacinus hendrerit, a varius elit mollis.

Nullam

Figure X. Arial, 10pt font, bold, Dark Gray (RGB #79, 78, 86)
OUTLINE GUIDE

Red Font: Indicate solicitation instructions, program description or statement of work presented in the solicitation.

Red Font (italicized): Indicate solicitation evaluation criteria.

Green Font: These are notes from BDG regarding the section and may include notes as to why something is included or moved.
ANNEX 1
TITLE OF ANNEX
ANNEX A: TITLE OF ANNEX

Text……

*Insert page break if annex text continues (page numbers should continue)*

*If next page is a divider, insert section break (then unmark footers and headers and remove page number)*

*Page number for each new annex starts at 1 on the annex title page*
Relevant Solicitation Instructions:

L.7 INSTRUCTIONS FOR PREPARATION OF THE TECHNICAL PROPOSAL The Technical Proposal must be entirely separate from the Cost Proposal and it must not include cost information and/or reference to cost data in order for the technical evaluation to be made strictly on the basis of technical merit.

The Technical Proposal must be written in English and formatted in a standard 8 1/2" x 11" sized document, single spaced, with font not smaller than in 11 pt. Times New Roman font (condensed font is NOT allowed) with top, left and right margins no less than one inch. Each page must be numbered consecutively. Charts, tables, and graphics may be in a smaller font, but not less than 10 pt. Any items embedded within a document must be objects only, not links.
ACDI/VOCA Style Guide

This style guide is intended to reinforce the ACDI/VOCA brand and make our written products more consistent, readable, and effective. It establishes our “house” writing style and spelling preferences, which are based primarily on the *Chicago Manual of Style* and the Merriam-Webster dictionary, and provides some general guidance on good writing practices. Please follow these guidelines when writing reports, proposals, news items, brochures, etc.—anything that is an ACDI/VOCA product.

Note: This guide addresses priority style issues and common problems—it is not comprehensive. If you have a usage (or grammar) question that is not covered in this guide, please contact C&O or consult the *Chicago Manual of Style*.

Quick and Dirty ACDI/VOCA Style Tips

General ACDI/VOCA Rules

- Acronyms
- Capitalization
  - Abbreviations and acronyms
  - Academic degrees
  - Currency
  - Directions
  - Headlines
  - Titles
- Figures (includes charts, graphs, graphics and illustrations)
- Foreign Place Names
- Foreign Words
- Gender Bias
- Lists
- Numbers
  - Dates
  - Dollar Amounts
  - Fractions
  - Measurements
  - Million, Billion, Trillion
  - Percent
  - Phone Numbers
Quick and Dirty ACDI/VOCA Style Tips

Please follow these priority guidelines to represent ACDI/VOCA consistently and professionally.

**Acronyms:** Avoid overusing acronyms, especially in letters, reports, and information intended for an external audience. Spell out the full name or term with the acronym in parentheses the first time it appears.

*Example:* ACDI/VOCA is a member of the Overseas Cooperative Development Council (OCDC).

**American Spelling:** Although (or because) we operate in many countries, we adhere to American spelling rules.

*Yes:* color, center, program

*No:* colour, centre, programme

However, if a word is part of a proper name, do not change its spelling, e.g., Jordan National Centre for Research and Development.

**Hyphens:** In most cases, do not use hyphens with prefixes:

*Yes:* nonprofit, agroforestry, subcontract

*No:* sub-award, multi-sectoral

There are exceptions to this rule; see “Prefixes” below.

**Lists:** In running text, use bullets to increase readability of long lists. In a bulleted list, be as economical with punctuation as possible. Do not use semicolons at the end of each bullet or “; and” at the end of the penultimate one. Do not use periods at the end of each bullet, unless they are complete sentences.

**Our Name:** ACDI/VOCA is our full name—we no longer indicate what ACDI and VOCA stood for (it’s too involved and no longer relevant).

*Yes:* ACDI/VOCA

*No:* A/V (except in informal, internal usage), ACDI-VOCA, ACDI VOCA, ACDIVOCA

Our field offices are designated by our full name followed by a hyphen and the name of the country: ACDI/VOCA-Liberia

**Serial Comma:** Use a comma before and in a series. Although it is correct both to use or not use the serial comma (also known as the Oxford comma), ACDI/VOCA’s style is to use it for greater clarity and consistency.

**Space between Sentences:** Skip only one space after a period before beginning the next sentence. Skipping two spaces is a convention based on a typewriter’s allocation of one space per letter regardless of its size. Computers space type proportionately, and thus the one space between sentences is sufficient. All books, newspapers, and magazines use this standard.
General ACDI/VOCA Rules

Acronyms
Avoid overusing acronyms, especially in letters, reports, and information intended for an external audience. Spell out the full name or term with the acronym in parentheses the first time it appears.

Example: ACDI/VOCA is a member of the Overseas Cooperative Development Council (OCDC).

If it is obvious to what the acronym refers, ignore this convention. If the term is only used once in the document, do not include the acronym.

Capitalization

Abbreviations and acronyms
Do not capitalize the words that form an abbreviation or acronym unless they are part of a proper noun:

Example: integrated pest management (IPM), statement of work (SOW), the Comprehensive Africa Agriculture Development Programme (CAADP)

Academic degrees
Use lowercase for types of academic degrees.

Example: bachelor of arts, master’s degree

Currency
Currency names are not capitalized (e.g., dollar, birr).

Put a space between the currency code (refer to the International Organization for Standardization) and the number. When using the currency code, do not also use a currency symbol ($, €, etc.).

Example: EUR 2,400
USD 1,000 (Alternatively, US$1,000, with no spaces)

Directions
Generally use lowercase with east, west, north, and south, but capitalize when referring to regions.

Example: The storm is coming from the north. But: A North-South dialogue has evolved over the issue of agricultural subsidies.

Headlines
Capitalize all words in a headline except articles and simple prepositions. Do not use semicolons or ampersands in headlines. Use single quotes for quotation marks. When using a compound modifier (e.g., climate-smart), capitalize both words.

Titles
Capitalize all specific titles before a person’s name.

**Example:** We wish to thank President John Doe of Mars. Or ACDI/VOCA Country Representative Jane Smith reports new trends.

Without the person’s name or if the title is placed after the name, do not capitalize.

**Example:** The president of Coca-Cola spoke today. Or Jane Smith, ACDI/VOCA country representative, reports new trends.

Differentiate between specific and general titles.

**Example:** At the seminar, ACDI/VOCA Senior Economist Jane Doe predicted .... (specific) **But:** In a recent article, economist Jane Doe predicted .... (general)

Or The U.S. Agency for International Development .... (specific) **But:** The agency announced a new initiative .... (general)

Other situations include the following:

**Example:** government of Ethiopia

**Example:** U.S. Embassy, Canadian Embassy (with country name, you should capitalize). **But:** The embassy was closed on account of the incident. (On second reference, do not capitalize.)

Leave the word program (or project) in lower case when it appears at the end of a program name, unless it is part of the program’s acronym:

**Example:** The SUCCESS Alliance project **But:** Enterprise Development and Training Program (EDTP)

**Figures (includes charts, graphs, graphics and illustrations)**

All figures should have a title, including a number, followed be a period. The first letter of figure should be capitalized as should the first letter of the figure title. For placement, follow the standard shown in the A/V templates on the C&O SharePoint site. See the following example: Figure 1.1. Only the first letter of figure should be capital (proper nouns should be capitalized), no period at the end

**Foreign Place Names**

Use the primary spelling for foreign place names in CIA World Factbook. If there is no entry for that place, follow USAID’s convention.

**Foreign Words**

Familiar terms (e.g., avant-garde, curriculum vitae) and foreign proper names are not italicized. Italics are used for isolated words and phrases in a foreign language if they are likely to be unfamiliar to readers. (The grève du zèle is not a true strike but a nitpicking obeying of work rules.) If a foreign word appears repeatedly in a document, it only needs to be italicized on its first use.
Gender Bias

Do not exclude either women or men when writing about something that involves both. At the same time, avoid awkward constructions like s/he, he/she, or him/her. Write she or he, him or her.

They is incorrect in the following: If a person is to eat well, they have to work at it. Rather, If a person is to eat well, he or she has to work at it. Or If people are to eat well, they have to work at it.

Chair

Use Chair, not Chairman, Chairwomen or Chairperson when identifying the Chair of an organization, board of directors, etc., regardless of the gender of the individual.

Lists

In running text, use bullets to increase readability of long lists. In a bulleted list, be as economical with punctuation as possible. Do not use semicolons at the end of each bullet or "; and" at the end of the penultimate one. Do not use periods at the end of each bullet, unless they are complete sentences.

The sentence introducing the bulleted or numbered list should be a complete sentence if it includes colons.

Example: The project objectives include the following: But: The ACIP team will (no colons)

Capitalize statements that come after the bullet or number.

Example:

The control panel manages basic settings:

- Control toner usage
- Adjust print quality
- Manage printer memory

Numbers

In general, numbers one through nine should be spelled out, and numbers greater than nine should be written as numerals. Follow this rule even when a number below ten and a number above ten appears in the same sentence. Exceptions can be made to save space in, for example, bulleted lists, PowerPoint presentations, and tables. Also, use numerals with percentages: 5 percent.

This rule applies to ordinal numbers, too: first, second, third, etc., should (generally) be spelled out, while 12th, 25th, 100th, etc., should be written as numerals.

Spell out any number at the beginning of a sentence.

Yes: Twenty-five volunteers arrived yesterday.
No: 25 volunteers arrived yesterday.

Written-out numbers use hyphens following words ending in –ty. The word and before such words is usually omitted.

Example: Twenty-two projects were won in a single quarter.
Example: Five hundred ninety-five degrees was the oven’s maximum temperature.

Dates

Local conventions may call for the date to be written 6 March 2012, but general ACDI/VOCA style calls for March 6, 2012.

Insert a comma between the day and the year. Example: October 28, 2012

Insert a comma after the year when the date does not fall at the end of the sentence. Example: June 8, 2010, marked the end of the project.

Do not insert a comma between the month and year if a specific day is not included. Example: August 2006

For centuries, do not capitalize the c of the word century. Example: 21st century

If you spell out a decade, do not capitalize the first letter. Example: The nineties

Do not use ordinals for dates. Example: They left on January 6.

Dollar Amounts

Example: Tomatoes sold for $1.05. The grant amount is $250,000. The $40 million building was condemned.

It is not necessary to insert US (as in US$150,000) unless there is a danger of confusing the currency with that of another country that uses the term dollar. If it is necessary to identify the currency as American, do not use periods in US; note the lack of spacing between US and the dollar sign.

Example: Jamaican farmers received loans totaling US$100,000.

Fractions

Spell out any fraction standing alone. Example: two-thirds of the missions

Use numerals for mixed numbers. Example: 4½ inches in diameter

Measurements

Since most of ACDI/VOCA’s work takes place overseas, measurements should be expressed using the metric system. If you are writing for a U.S. audience, however, measurements may be converted to their U.S. equivalents. Whether you use the U.S. or metric system, consistency within the document is of primary importance.

Use numerals: 5 lbs., 18 km

Use a comma if the number has four or more digits: 8,432

Million, Billion, Trillion
Use numerals, and spell out million, billion, and trillion. **Example:** 23 trillion, 5 million

**Percent**
Always use numerals with percent. **Example:** Almost 5 percent of the electorate cast write-in votes. The company cut costs by 30 percent.

**Phone Numbers**
Domestic and international phone numbers should be written with plus one before the area code and only spaces, no hyphens.

**Example:** +1 202 469 6000

**Time**
Use numerals and periods in a.m. and p.m. **Example:** 4 p.m., 8:45 a.m.

**Photos**
All photos should include a caption below and where possible, a photo credit.

**Prefixes**
Only use prefixes with hyphens in the following situations:

1. before a capitalized word or numeral, **Example:** sub-Saharan, pre-1950
2. before a compound term, **Example:** non-self-sustaining, pre-Vietnam War
3. to separate two i’s, two a’s, and other combinations that might cause misreading, **Example:** anti-intellectual, extra-alkaline, pro-life
4. to separate the repeated terms in a double prefix, **Example:** sub-subentry
5. when a prefix or combining form stands alone, **Example:** over- and underused, macro- and microeconomics

Other exceptions: The prefixes ex and self always take a hyphen. **Example:** ex-president

Visit the Words to Watch document for more information on prefixes.

**Punctuation**

**Academic degrees**
Use periods when abbreviating academic degrees. No spaces within the abbreviation.

**Example:** bachelor of arts (B.A.), master of arts (M.A.), master in business administration (M.B.A.)

**Apostrophes**
Acronyms and abbreviations, such as SME and Ph.D., are made plural simply by adding an s—not an ’s. **Example:** He has two Ph.D.s.

Add an apostrophe before the s only if confusion may result. **Example:** The rpm’s were higher than ever when the motor blew.

Decades are expressed as the 1980s or the ‘80s (no apostrophe).
The possessive of most singular nouns is formed by adding an apostrophe and an s, and the possessive of plural nouns by adding an apostrophe only. **Example:** Dickens’s novels, the horse’s mouth, dinner at the Browns’ (that is, at the Browns’ home).

**Commas**

Use a comma before and in a series (i.e., serial comma or Oxford comma). **Example:** My favorite colors are red, green, and blue.

Commas set off the elements of an address, except for ZIP codes. **Example:** Write to us at ACDI/VOCA, 50 F St. NW, Suite 1075, Washington, D.C. 20001. The state or country is set off by commas when following a city. **Example:** We closed our Madison, Wisconsin, recruiting office in 2002. The plane was diverted to Katmandu, Nepal, because of the storm.

Etc., i.e., and e.g. are always set off in commas. **Example:** All our nonprofit competitors, e.g., Winrock, CNFA, Land O’Lakes, CHF, etc., were left in the dust by our coup.

Likewise, if Ltd. or Inc. is preceded by a comma, there should also be a succeeding comma. **Example:** Apple, Inc., has used the same logo since 1998.

Commas also separate introductory clauses and phrases. **Example:** Before she goes home, she will finish the report. However, the comma should be omitted in cases where it is unnecessary. **Example:** In 2005 the project began issuing grants.

Commas set off nonessential clauses. **Example:** The program, which will be implemented in the fall, is funded by the World Bank.

When a noun is preceded by two or more adjectives that could, without affecting the meaning, be joined by and, they are usually separated by a comma. **Example:** It was an inexpensive, successful venture.

**Hyphens and Dashes**

There are distinctions between a hyphen and the two categories of dashes, one short (en) and one long (em). En and em dashes can be found under symbols in Microsoft Word. Do not use spaces before and after hyphens or dashes.

Use a hyphen to make a compound. **Example:** short-term, 18-year-olds

Do not use a hyphen after an adverb ending in –ly. **Example:** economically disadvantaged countries

Use an en dash to substitute for the word to. **Example:** 2001–2008, pages 23–26

Use an em dash for an interjected clarification, although parentheses or commas might be used instead. **Example:** The staple crops—wheat, corn and soybeans—may not afford the earning potential of niche crops.

Use an em dash to emphasize or draw attention to material. **Example:** The project will allow businesses—large and small—to avail themselves of critical financing.

**Parentheses**
Use brackets for a parenthetical insertion inside an expression already in parentheses.

**Example:** (He had already eaten 50 [hard-boiled] eggs.)

**Quotation Marks**

Periods and commas fall inside the quotation marks. **Example:** The page was marked “memorize.” The camera was sold as “waterproof,” but “moisture-resistant” would have been a better description.

However, the colon and semicolon fall outside. **Example:** There was only one thing to do when he said, “Evacuate now”: We left.

The dash, question mark, and the exclamation point fall inside the quotation marks when they refer to the quoted matter only; they fall outside when they refer to the whole sentence.

**Example:** He asked, “When did she leave?” What is the meaning of “the open door”?

**Example:** The sergeant shouted “Halt!” Save us from his “mercy”!

Use single quotation marks in headlines and titles. Otherwise, do not use single quotation marks unless the quoted material falls within a sentence in full quotation marks. **Example:** “The ‘printer problem’ turned out to be my cat.”

**References**

Please follow the formats below when citing published works in Bibliographies and References. These guidelines follow the Chicago Manual of Style. In-text cites should contain author/organization name and the date only in parentheses (just enough information to direct the reader to the bibliography). Footnotes are also an option. Please consult C&O if you need help when working with references for your report/publication.

**Books/reports with a single author**

Surname, First Initial./name of organization. *Report or Book Title*. City/Country of publication: Publisher’s name/name of organization, Year.


**Books/reports with multiple authors** (note that the name of the first author is inverted [last name first] for the purposes of alphabetization)

Surname, First Initial., and First Initial. Surname. *Report/Book Title*. City/Country of publication: Publisher name, Year.

**Journal articles**

Author (Surname, Initial)/organization. “Article Title.” *Name of Journal* volume, no. issue (Year): page #-page #.

Working paper/unpublished work
Surname, First Initial. “Title." Unpublished manuscript/working paper. City/country of organization: Organization's name, Year.

Newspaper article with attributed author
Last name, First initial. “Article Title," Newspaper Name, Month day, Year. (if you retrieved the article from the paper’s website, list URL, too).

Newspaper article without an attributed author
Newspaper Name. “Article Title.” Month day, year.

Websites

Tables
All tables should have a title, including a number, followed be a period. The first letter of table should be capitalized as should the first letter of the table title. The table title should be at the top of the table, left-centered. See the following example: Table 1.1. First letter of table should be capital, no period at the end.

Titles of Publications
Titles and subtitles of books, magazines, and journals (not newspapers) are italicized and capitalized when mentioned in text, notes, or bibliography. Titles of articles, chapters, and other short works are set in roman type and enclosed in quotation marks.

Typeface
Use a serif (footed) typeface (e.g., Times New Roman or Garamond) for documents read in hard copy and a sans serif typeface (e.g., Arial) for materials read on a computer monitor. This advice is based on studies of reading speed and comprehension. Avoid elaborate or cute typefaces (e.g., Monotype Corsiva, Comic Sans) in business documents.

Avoid putting large bodies of text in bold, capitalized, or italicized type since they are harder to read.

Inclusive Language
The way we use language matters. Language has the power to shape and reflect reality by giving form to ideas. Our choice of words has power because it influences the reality that is being presented and understood by the reader. Using authentic language not only promotes better understanding of the communities we serve but also helps us avoid language that can reinforce unequal power dynamics. Whether intentional or not, the language we use has a steering effect and can imply “othering,” which sets a dominant group as a norm and a minority group as the “other.” Some commonly used development terms may indicate a bias toward Western superiority, neocolonialism, or patriarchy. The following section includes guidance on how to avoid this type of language in favor of inclusive language that supports genuine collaboration with the communities we serve.
**General guidance**

People-first language: Aim to make personhood the primary characteristic of every person, not their descriptive characteristics, e.g., “people with disabilities” rather than “the disabled.” People-first language sets descriptive characteristics as secondary. While strictly adhering to this principle may result in awkward sentence construction or phrasing, it promotes a deeper understanding of shared humanity and centers people first.

Active voice: Active voice puts the subject of the sentence in the role of performing the action, e.g., “the farmer marketed their produce,” rather than “the produce was marketed by the farmer.” Active voice improves writing and also empowers the people being written about.

Self-Identification: When groups have an identity or term for themselves, it is important to respect and use that term. Categorization and labels can sometimes promote power differences or ignore or suppress marginalized social identities. As much as possible, include language that reflects peoples’ choices in how they speak about or refer to themselves. If you aren’t sure, ask.

Proper Nouns: Using names for and by individual places, persons, and organizations conveys respect and understanding. In some cases, overuse of common nouns and pronouns, e.g., “it” or “that,” can dilute an issue or create confusion. Be as specific as possible so that readers understand critical points and who is being discussed.

**General terms**

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>beneficiaries</td>
<td>participants</td>
</tr>
<tr>
<td>target populations</td>
<td>name the specific group, when possible (e.g., women, youth, people experiencing poverty)</td>
</tr>
<tr>
<td>the field</td>
<td>country operations, country programs, country program offices</td>
</tr>
<tr>
<td>headquarters</td>
<td>home office</td>
</tr>
<tr>
<td>third world</td>
<td>developing countries or emerging economies</td>
</tr>
<tr>
<td>first world</td>
<td>industrialized countries</td>
</tr>
<tr>
<td>the Global South/Global North</td>
<td>name the specific country or region</td>
</tr>
</tbody>
</table>

**Food**

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>famine (only avoid when using casually and inaccurately)</td>
<td>food poverty or insecurity</td>
</tr>
<tr>
<td>the hungry</td>
<td>a malnourished or undernourished person</td>
</tr>
</tbody>
</table>

**Languages**

Local languages should be incorporated as much as possible, especially when a translation does not quite capture the concept or term as accurately. Local languages have value and culture attached to them. Avoid denigrating local languages by referring to them as “dialects.”
Use discretion when deciding which words to include in local languages. Only do so when a word carries a cultural significance or does not translate well to English. In such cases, place the word in italics and provide the best definition possible in parenthesis following the word: “cooking the traditional Venezuelan dish hallacas (corn dough stuffed with meat).”

**Ethnicity and Culture**

When writing about different ethnic, cultural, and indigenous groups, it is important to use appropriate, specific, and relevant terms.

“Indigenous” refers to all indigenous peoples. Whenever possible, use a specific name of the indigenous group being described (e.g., Cherokee).

Capitalize the proper names of tribes, nationalities, and cultural groups (e.g., Black, French-Canadian, Inuit, Bangladeshi, Cree). Some argue the exception to this rule should be “white.” As the Columbia Journalism Review explains, “For many people, Black reflects a shared sense of identity and community. White carries a different set of meanings; capitalizing the word in this context risks following the lead of white supremacists.” However, others argue the opposite based on the idea that White people have had the comfort of being viewed as “unraced” for centuries and should be recognized as having a racial identity. In keeping with our adherence to the Chicago Manual of Style, we recommend following its guidance on the topic: “As a matter of editorial consistency, similar terms such as White may also be capitalized when used in this sense. Usage varies according to context, however, and individual preferences should be respected.”

While in some cases it is preferred to describe someone as “a black person” or “a person of color,” it is important to keep in mind that “person of color” and “Black” are not the same. Similarly, “person of color” and “immigrant” are not the same.

Avoid references that draw unnecessary attention to ethnic backgrounds or racial identities. When references are valid and necessary, use appropriate specific terminology or use the term preferred by the person or group concerned. When doing so, include mention of the ethnic, racial, or cultural background of all individuals, not just those who are non-White.

Avoid using “Blacks” and “Whites” as nouns, which define people by race. Use them as adjectives to describe people (e.g., Black voters).

Use the plural “communities” and “experiences” rather than the singular “the Black community” or “the experience of the Black community.”

Hispanic is not interchangeable with Latino, Latina, and Latinx, but it may overlap. In general, Hispanic refers to a person who speaks the Spanish language, whereas Latino, Latina, and Latinx refers to a person from Latin America. Defer to individual preference or be as specific as possible (e.g., Honduran, Guatemalan, Colombian).
<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>mixed</td>
<td>person/people of color, multiracial, biracial, or interracial</td>
</tr>
<tr>
<td>minority</td>
<td>minority ethnic or cultural group</td>
</tr>
<tr>
<td>part-native</td>
<td>indigenous</td>
</tr>
<tr>
<td>Caucasian/Negro</td>
<td>White/Black</td>
</tr>
<tr>
<td>colorblind</td>
<td>White privilege</td>
</tr>
<tr>
<td>Oriental</td>
<td>people of Asian or Pacific heritage</td>
</tr>
<tr>
<td>post-racial</td>
<td>discrimination, prejudice</td>
</tr>
</tbody>
</table>

**Age**

Most times, there is no need to refer to a person’s age. When the need arises, list the specific age number, rather than assigning a category that may be vague and create negative connotations.

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>emerging adult</td>
<td>adolescent, young person, youth, male and female youth</td>
</tr>
<tr>
<td>middle-aged</td>
<td>ageing</td>
</tr>
<tr>
<td>the elderly/old</td>
<td>elderly person</td>
</tr>
</tbody>
</table>

**Disability**

Most times, there is no need to refer to a person’s disability, but when the need arises, choose acceptable terminology for the specific disability or use the term preferred by the individual.

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>the disabled</td>
<td>person who is disabled or with disabilities</td>
</tr>
<tr>
<td>able-bodied</td>
<td>person without disabilities</td>
</tr>
<tr>
<td>crippled/impaired by</td>
<td>person with . . .</td>
</tr>
<tr>
<td>differently abled</td>
<td>person with disabilities</td>
</tr>
<tr>
<td>handicapped</td>
<td>person with disabilities</td>
</tr>
<tr>
<td>suffering from . . .</td>
<td>person who has . . .</td>
</tr>
<tr>
<td>wheelchair bound</td>
<td>person who uses a wheelchair</td>
</tr>
</tbody>
</table>

**Immigration/Refugee Status**

State borders are often used to define and describe groups of people and are often tied to the rights and opportunities those groups are able to access. It is important to use language that does not equate people with their immigration, refugee, or travel status and to raise the visibility of their personhood while experiencing displacement. It is also important to use language that breaks down insider/outside divisions and emphasizes common humanity.

**Refugees** are people who are forced to flee their home countries by violence, persecution, or natural disaster.
**Internally displaced people** are those who are forced to flee but not across national borders.

**Displaced people** are those who match the description of either of the above.

**Migrants** are people who are in the process of moving, commonly for economic reasons but not always.

**Immigrants** are people who have moved permanently (changed countries of residence) for any number of reasons.

**Stateless persons** are people who are not considered as a national by any state under the operation of its law. (Some stateless people are refugees, but not all refugees are stateless people.)

**Asylum seekers** are people who have applied for refugee status and are waiting to hear the results of their claim.

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>an alien or illegal immigrant</td>
<td>undocumented immigrant or person seeking citizenship</td>
</tr>
<tr>
<td>anchor baby or second-generation</td>
<td>children of immigrants</td>
</tr>
<tr>
<td>illegal asylum seeker</td>
<td>refused asylum seeker</td>
</tr>
<tr>
<td>legal citizen, legalized, or naturalized (unless used in the legal sense under U.S. law)</td>
<td>person with citizenship in…</td>
</tr>
</tbody>
</table>

**Gender**

Gender terminology includes man, woman, boy, and girl as well as non-binary gender identity terms; sex terminology includes male and female.

“They” is a good alternative, if you aren’t sure of the person’s pronoun preference.

If a gender-neutral term is available and does not change the meaning, consider using it. Often this just means pluralizing the antecedent to avoid the use of a singular pronoun, e.g., “employees should read their packets carefully,” rather than “each employee should read his packet carefully.”

Do not gratuitously describe a woman as a “mother of three.” Family details and marital status are only relevant in stories about families or marriage.

Use parallel terms or terms of equal status and avoid terms that denote gender inferiority (e.g., “husband and wife” and “staff in the office,” rather than “man and wife” and “girls in the office”).

Avoid terms that specify gender in the profession where it is not required (e.g., “police officer” and “chair,” rather than “policeman” and “chairman”). Adding “male” before “nurse” or “lady” before “doctor” is unnecessary.
Avoid defaulting to umbrella terms like “homosexual.” Use LGBTQI to refer to a broad community or be specific.

While people who work in the home may not have a contractual employer, reference the work they contribute in the home.

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>homosexual</td>
<td>gay, queer, LGBTQI</td>
</tr>
<tr>
<td>mankind</td>
<td>humankind</td>
</tr>
<tr>
<td>sexual preference, lifestyle choice</td>
<td>sexual orientation</td>
</tr>
<tr>
<td>transgender (as a noun), transvestite, transgendered</td>
<td>transgender (as an adjective), trans man, trans woman</td>
</tr>
<tr>
<td>sex change</td>
<td>gender confirmation surgery</td>
</tr>
<tr>
<td>gender bender</td>
<td>gender identity, non-binary, non-gendered, genderfluid, genderqueer, third gender, two-spirit</td>
</tr>
<tr>
<td>prostitution</td>
<td>sex work</td>
</tr>
<tr>
<td>hermaphrodite</td>
<td>intersex</td>
</tr>
</tbody>
</table>

**Violence**

When writing about sexual violence, it is important to use language that upholds a global consent culture and is respectful of survivor experiences.

Writing should be clear that rape and sexual assault are in no way associated with normal sexual activity.

Sexual violence is an expression of power that can happen in many ways, and survivors may express a wide variety of responses to their experiences. Language used should be neutral and non-judgmental.

Sexual violence is not a “women's issue,” so while it is possible to discuss or describe incidents, events, or outcomes that involve women and girls, it is important to avoid presenting a narrative that limits the topic to women.

When possible, provide information about where survivors of violence can access assistance.

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>victim (unless this is the preference of the individual)</td>
<td>survivor, person who experience. . .</td>
</tr>
<tr>
<td>gender-based violence (only when in reference to violence specifically against women)</td>
<td>violence against women</td>
</tr>
<tr>
<td>wife abuse, wife beating</td>
<td>intimate partner violence, domestic or household violence, economic abuse</td>
</tr>
<tr>
<td>date or acquaintance rape</td>
<td>rape, sexual assault</td>
</tr>
</tbody>
</table>
**Socioeconomic Levels**

When possible, avoid language that replicates class stereotypes. It is important to use language that is conscious of the systems that promote wealth and provide opportunities to some while limiting access to others.

<table>
<thead>
<tr>
<th>Terms to avoid/question:</th>
<th>Terms to use instead:</th>
</tr>
</thead>
<tbody>
<tr>
<td>disadvantaged</td>
<td>person/people living in or experiencing poverty</td>
</tr>
<tr>
<td>in need, the needy, less fortunate</td>
<td>lacking financial stability or economic opportunity</td>
</tr>
<tr>
<td>the poor</td>
<td>low-income (as an adjective)</td>
</tr>
<tr>
<td>unskilled or low-skilled</td>
<td>(do not qualify labor as low- or high-skilled)</td>
</tr>
</tbody>
</table>

**Names of People**

Always include accents like ň, ó, í, é, and ç in people’s names (e.g., Beyoncé).

All names constructed as first name al-last name should follow that style for full names but drop “al-” when using only last name (e.g., Muqtada al-Sadr, but Sadr on subsequence references).

Always include the full surnames of a person (assuming they have multiple surnames), if that is what they prefer.

**References:**


Words to Watch

Below is a list of commonly confused or misspelled words that are frequently used in our different types of writing.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

A
above-cited
above-mentioned
advisor
Afghan (adjective for a person)
Afghani (adjective for inanimate objective, e.g., currency)
aforementioned
agreed-upon
agribusiness (preferred over agro-enterprise or agroenterprise)
agriculturally based
Agrocapital
agrochemicals
agroentrepreneurs
agroforestry
agrotourism
.m. (not AM or am)
anticorruption
antiretroviral
arabica (coffee)
at-risk (adj.)
avian influenza

B
bachelor of arts (or B.A.)
bachelor's degree

backstop
backstopping
bar code (n.)
bar coding (n.)
bar-coded (adj.)
baseline
beekeeper, beekeeping
Bellmon Analysis
benchmark (noun and verb)
benefitted
bilateral
Bill & Melinda Gates Foundation (note ampersand)
biocontrol
biodegradable
biosafety
biweekly
board of directors
bookkeeping
borehole
brazil nuts
broad-based
broken-down
brownbag
building block (n.)
building-block (adj.)
businesslike
businessman (but small-business man)
business people
business-to-business linkage
businesswoman (but small-business woman)
buy-in (n.)
buy into (v.)
by-election
bylaw
byproduct

capacity building (n.)
capacity-building (adj.)
capital (city or funding)
capitol (building)
capital-intensive
capitalist
case-by-case
cash crop production (no hyphen)
cash-flow (n. or adj.)
cash-for-work activities
cattleman
cattle raiser
cattle-raising
the Caucasus (sing.)
CDO (cooperative development organization)
cease-fire (n.)
Celsius
centigrade
certified organic
certified Fair Trade
chairperson
Chevron (no longer ChevronTexaco)
chili peppers (sing.), chilies (pl.)
citywide
clear-cut (adj. and v.)
climate-smart program
close out (v.)
closeout (n. and adj.)
combating
cold storage container
communist
the Communist Party
community-based
communitywide
companywide
conflict resolution skills (no hyphen)
consortia
cooperative
coop (not coop)
co-owner
co-sponsor
cornmeal
corn soy blend (CSB)
corps (sing. and pl.)
cost-benefit analysis
cost-cutting
cost-effective
cost extension
cost-of-living
cost-plus (adj.)
cost-reimbursable (adj.)
cost-share (n. and adj.)
cost share (v.)
counterpart
countryside
countrywide
COVID-19 or the coronavirus disease (derived from “CO(rona) VI(rus) D(isease) 20(19)”; refers to the disease, not the virus that causes the disease: See “SARS-CoV-2”)
CredAgro
creditworthy
crop protection chemicals
cross-actor (adj.)
cross-cutting (adj.)
cross-reference
crossroads
cross section
cum laude (magna cum laude, summa cum laude)
custom-made
cutback (n.)
cut off (v.)
cutoff (n.)
cutting-edge (adj.) (but on the cutting edge)

dairy farm
dairyman
damsite
database
data-rich
daylight
day-to-day
dealmaker
dealmaking
debt rescheduling (n.)
decadelong
decades-long
decision maker (n.)
decision making (n.)
decision-making (adj.)
depulping
destocking
deworm
dialogue
disburse (to pay out money)
disperse (to scatter)
doctorate
drip irrigation
dryland farming

E
early or mid-1980s
early-to-middle March
earth (soil)
Earth (planet)
East Timor (not Timor-Leste)
ECafe Foundation
economies of scale
ecotourism
e-Choupal
E. coli
effect change (not affect)
e-mail
embassy (but United States Embassy in Argentina)
emerging-market country
emigrate (refers to departure)
end market
end-market (adj.)
e-newsletter
enrollment
ensure (to guarantee)
Equator
equatorial
et al.
e-toolbox
EurepGAP, now GLOBALGAP

F
fact-finding (adj.)
factsheet
fair trade
Fair Trade (if referring to the official status)
Fair Trade Certified tm
fall, spring, winter, summer (lower case)
Far East
Farm-to-market roads
farmer field school
farmer members (no hyphen)
Farmer-to-Farmer Program (abbreviate as F2F)
Farming as a Business (FaaB)
farmwork
farmworkers
far-reaching
federal
fee-for-service
feedgrain
feedlot
feed mill
feed mixing plant
field test (n.)
field-test (v.)
field-tested (adj.)
fieldwork
fine-tune
fine-tuning
Filipino
first-class (adj.)
firsthand
firm-level (adj.)
FY16 (not FY 2016)
fisherfolk (awkward, avoid if possible)
fixed-fee (adj.)
follow-on (n. or adj.)
follow-through
follow up (v.)
follow-up (n. or adj.)
food aid-based (adj.)
food aid program
food-deficit country
food-for-work program
food-secure country
foodborne
foodservice
food processing (adj.)
foodstuffs
foreign aid (preferable to say international economic assistance, etc.)
foreign exchange
Foreign Service (when referring to the U.S. Foreign Service)
for-profit (adj.)
forums (not fora)
forward-based
forward-looking
fourth quarter (n.)
fourth-quarter (adj.)
framework
francophone
free enterprise
free market (n.)
free-market (adj.)
free trade (n.)
free-trade-oriented
front-loading
ft. (foot, use period)
full-scale (adj.)
full-time (adj.)
fundraiser
fundraising (n., v. or adj.)
GLOBALGAP (formerly EurepGAP)
GPS
GMT (now replaced by UTC, Coordinated Universal Time)
GNP
goodwill (n.)
government of Ethiopia (government is not capitalized)
grants-in-aid
grassroots
green revolution (not capitalized)
groundbreaking
groundnuts
grower-owned
growth rate
Gypsies (preferably the Roma people or Romany)

H
hajj, hajji
hand-in-hand
handmade
health care
headquarters (abbreviated HQ)
higher-income (adj.)
higher-paying (adj.)
higher-than-market price
high-level (adj.)
high-protein (adj.)
high-quality (adj.)
high-value (adj.)
HIV/AIDS

G
Gambia (not the Gambia)
Ghanaian
GIS
homepage
host country (n.)
host-country (adj.)
host government (n.)
host-government (adj.)
HTML

I
immigrate (refers to arrival)
implementer
in. (inch, use period)
income-generating (adj.)
in-country (adj.)
in-depth
in-kind
infrastructure
insure (buy insurance)
integrated pest management (IPM)
internet (not capitalized, preferred to World Wide Web)
intercrop
interfirm
interorganizational
interplant
interrelationship

J
jump-start (v.)
jump start (n.)

K
Kazakhstan

kick-off (adj.)
kick off (v.)
km (kilometer, no period)
know-how
Kyrgyzstan (not Kyrgyz Republic)

L
labor-intensive products (adj.)
landholding
land mine
land-use management
lay out (v.)
layout (n.)
lb. (pound, use period)
leader with associates (LWA)
lessons learned
lessons-learned materials
life span
loan (n.) (it is preferable to use lend as a verb [past tense lent] and loan as a noun)
long run (n.)
long-run (adj.)
long-standing (adj.)
long-term projects
long term (n.)
longtime (adj.)
lower-income
lower-level (adj.)
low-cost
lowlands
M
m (meter, no period)
M.A. (master of arts)
macroeconomic (adj.)
Marine (when referring to a member of the U.S. Marine Corps)
market-oriented (adj.)
marketplace
mark up (v.)
markup (n.)
Mars, Inc.
master's degree
M.B.A. (master in business administration)
member-owned and -run associations
memorandums (not memoranda)
meta-analysis
metric ton (abbrev. MT)
mi. (mile, use with period)
micro and small enterprises
micro-, small- and medium-scale enterprises
micro, small and medium-sized enterprises
microcredit
microeconomic
microentrepreneurs
microenterprise
microfinance
microlender
microlending
microloan
middleman (sing.)
middlemen (pl.)
midsize
mid term (n.)
minigrants
Mission (USAID Mission in Bolivia)
missions of USAID
Mount (not Mt., Mount Everest)
M.S. (master of science)
MT (metric ton)
mud crab (mangrove crab is preferable)
multi-institutional
multidisciplinary
multilateral
multinational
multisectoral
multiyear
Muslim (not Moslem)
N
nationwide
NGO (nongovernmental organization)
No. (for number, note capitalization)
no-cost extension
nonbank financial institutions
noncompetitive
nonfat
nongovernmental
nonprofit (by the way, we’re a 501(c)(3) organization under the IRS code)
onviolent
not-too-distant
off-season (adj.)
off-site
offtake
OECD
oilseed
onboarding
ongoing
onlend (v.)
online
on-site
OPEC
outgrower
outsource
out-years
overgraze

packinghouse
Palestinian-administered territories
pass-through
payback
peacebuilding
peacekeeping
peacemaking
peacetime
peer-group loans
People’s Republic of China
people-to-people
percent (not per cent nor %, unless in a chart)
peri-urban

Ph.D.
the Philippines
phytosanitary
PL 480 Title II
p.m. (not PM or pm)
policymakers
policymaking
Port-au-Prince
post-harvest handling
preventive (not preventative)
private sector companies (no hyphen)
proactive
proindustrial
promarket
pro-growth
pro-poor
public-private partnerships
public sector (no hyphen when adj.)

quality control

rain forest
ready-to-use
realign
recordkeeping
robusta (coffee)
roll-out (n.)
roll out (v.)
runoff (n.)
run off (v.)

S
Sahel (use sub-Saharan region)
SARS-CoV-2 (refers to the virus, not the disease it causes)
scalable
scale up (v.)
scaling-up (n. and adj.)
sealed-bid auction
set-aside (n.) (v. is set aside)
set up (v.)
setup (n.)
shall (avoid using in the mandatory sense, use must instead)
shareholder
share owner
shelf life
Shiite or Shia Muslims (be consistent with either within a document)
shortlist (v.)
short-term projects
side by side
skill set
slash-and-burn land clearing
small business
small-business man/woman (but businessman and businesswoman)
smallholder
small- and medium-scale enterprises
small- and medium-sized businesses
small- and medium-sized enterprises
socioeconomic
South-to-South
Southeast Asia
Southern Sudan
soymilk
spin-off
spring (seasons not capitalized)
staff is (not staff are; for an individual, use staff member)
stand-alone
start-up (n. and adj.)
state-of-the-art (adj.)
subaward
subcontractor
subgrant
sub-Sahara
subsector
Sudan (not the Sudan)
sugarcane
summer (seasons not capitalized)
Sunni Muslims

T
task order
third world (out of fashion, use developing countries)
timeframe
tool kit
topdress, topdressing
topsoil
toward (not towards)
town hall meeting
training of trainers (TOT)
training-of-trainers project
TransFair USA
transitional economies
transnational
transboundary
transborder
traveled
troubleshoot
truckload
tsunami
turn over (v.)
turnover (n.)
twofold

U
Ukraine (not the Ukraine)
underemployed
underfunded
underserved
U.N. (not UN)
UNDP (United Nations Development Programme)
UNESCO
UNICEF
United States (U.S.) (not US)
up-to-date
URL (uniform/universal resource locator, or web address)
USAID (not the USAID. Also, avoid AID unless meaning is clear)
USAID-funded program
USAID/Kenya (not USAID-Kenya)

United States (n.)
U.S. (not US) (adj.)
U.S.-donated food aid
U.S. government
U.S. Navy (or Army, etc.)
USG (use only when meaning is clear)
U.S. House of Representatives

V
value-added products
value-added processing
value chain
value chain approach
versus (preferable to abbreviate as vs.)
vice president (use lower case unless used with full title directly in front of proper name)
Vietnam
vis-à-vis
voice mail

W
wastewater
waterborne
watershed
web (n. or adj.) (as in the World Wide Web)
website
well-being
well-earned salary (hyphenated when noun follows)
Western (capitalize when referring to Europe and the Americas)
whistleblower
wholly owned (no hyphen)
winter (seasons not capitalized)
work plan
World Food Programme
write-offs

Y
year-round
yogurt (not yoghurt or yoghourt)
youth-in-business
Year 2 (not year 2, year two, or Y2)